

## HBS mi-Zone

### User Guide

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## Introduction to mi-Introducer and mi-Zone

mi-Introducer is the first ever system that provides the vital link between a mortgage broker and their introducer. This system links to the Advisor's system, mi-Zone.

Leads are the lifeblood of a successful mortgage broking business. So it is important that you provide your introducers with the tools to do the job properly for you. In doing so you:

- have a method of getting the maximum number of leads possible
- provide a slick, professional system for doing it
- receive the leads whilst they are still very hot
- give the introducer the ability to check on cases to be confident they are being dealt with

mi-Introducer does this and so much more. It provides a totally professional approach to what is often a very hit and miss affair.

For your existing Introducers it shows them your commitment to them and that you are serious about the relationship. For winning new lead business imagine being able to demonstrate a physical process for referring leads and managing them. They cannot fail to be impressed.

It is amazing that the vital role of lead production is so often a very chaotic, unstructured, inefficient process. With mi-Introducer those days are over.

## How do mi-Introducer and mi-Zone work?

### Setting It Up

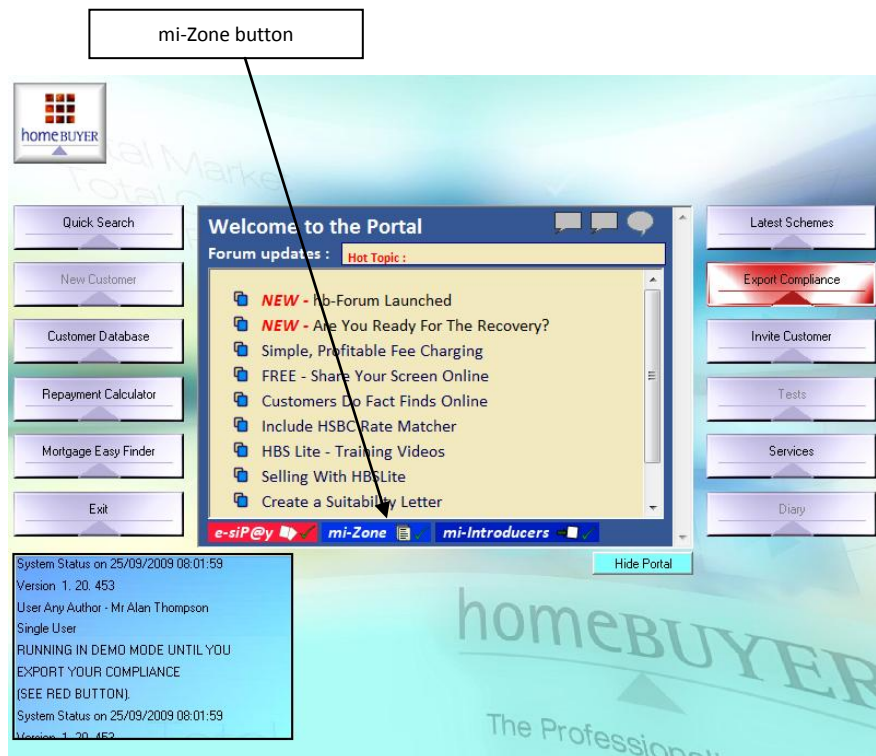
mi-Introducer provides a simple uncomplicated system for the creation, delivery and monitoring of leads.

Initially your Introducer needs to be set up with access to the system. The system is all online so setting up is simplicity itself. We provide a separate User Guide for them to set the system up and for the general use of it.

mi-Introducer passes leads to the mi-Zone system which is accessed by clicking on the mi-Zone button (the blue one with the documents graphic on it) in the Portal section of the front screen of your HBS as shown in the following screenshot. It can also be accessed from our website from the Logon Tab.

# HBS – THE TOTAL SALES PROCESS

## HBS User Logon



Having clicked the mi-Introducer button this brings up your “Dashboard”, the screen you control everything from.

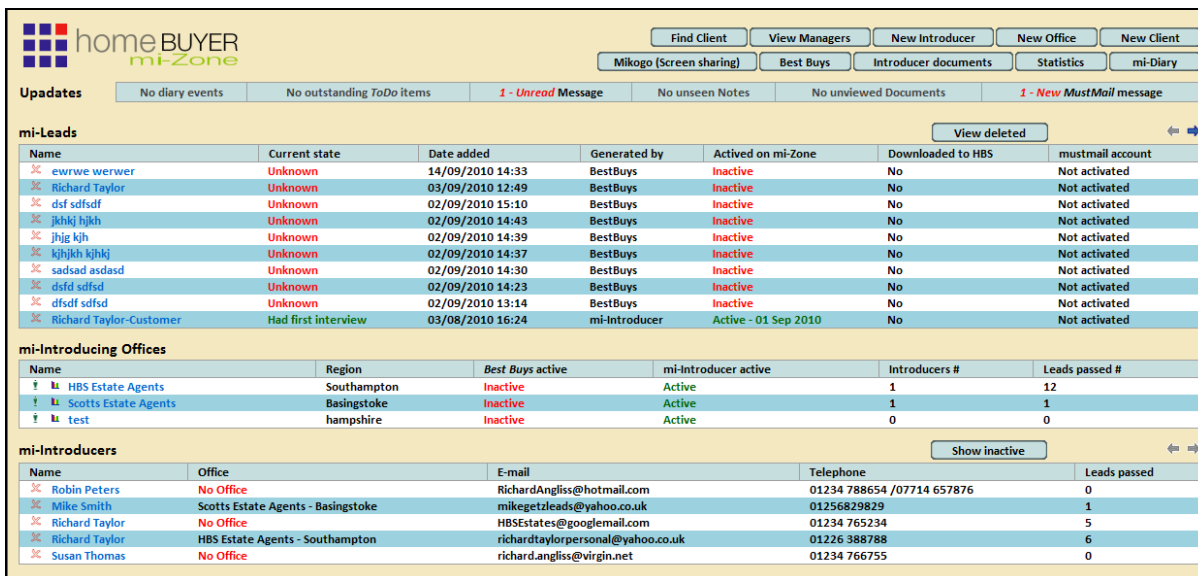
## Non HBS User Logon

For customers not using the HBS mortgage sourcing system, which of course includes Introducers, access can be gained from our website [www.homebuyersystems.com](http://www.homebuyersystems.com). By clicking on the “Logon-Signup-Get a Trial” Tab and then by clicking “mi-Zone Advisor” button in the “Logon to mi-Zone or mi-Introducer” section you can open your system.



# HBS – THE TOTAL SALES PROCESS

## Overview of the “Dashboard”



The screenshot shows the HBS Dashboard interface. At the top, there is a navigation bar with buttons for 'Find Client', 'View Managers', 'New Introducer', 'New Office', and 'New Client'. Below this is a secondary bar with buttons for 'Mikogo (Screen sharing)', 'Best Buys', 'Introducer documents', 'Statistics', and 'mi-Diary'. The main content area is divided into several sections:

- Updates:** A summary bar showing 'No diary events', 'No outstanding ToDo items', '1 - Unread Message', 'No unseen Notes', 'No unviewed Documents', and '1 - New MustMail message'.
- mi-Leads:** A table listing leads with columns: Name, Current state, Date added, Generated by, Activated on mi-Zone, Downloaded to HBS, and mustmail account. The table shows several leads in 'Unknown' or 'Inactive' states.
- mi-Introducing Offices:** A table listing offices with columns: Name, Region, Best Buys active, mi-Introducer active, Introducers #, and Leads passed #. It shows three offices: HBS Estate Agents (Southampton), Scotts Estate Agents (Basingstoke), and a test office (hampshire).
- mi-Introducers:** A table listing individuals with columns: Name, Office, E-mail, Telephone, and Leads passed. It shows five individuals, including Robin Peters, Mike Smith, Richard Taylor, and Susan Thomas.

The screen is divided into 4 main sections:

- **Updates** - At the top of the screen the “Updates” area gives you a snapshot of where you are with things and very importantly allows you to ensure you are always on top of everything. This is obviously very important in managing the relationship with your Introducers.
- **mi-Leads** – this shows all the leads (starting with the most recent) that you have received and records their progress. By clicking them you open up the case so that you can update it
- **mi-Introducing Offices** – this shows all the different companies or offices of each of your Introducers
- **mi-Introducers** – within each office there may be many people who introduce to you (e.g Negotiators in an Estate Agents office) in this section they are recorded here

For each of these section if you click on “Name” it will open up a screen that gives you the specific details for what you have clicked.

At the very top of the screen are the “Task buttons”.

The Task Buttons are:

- **Find Client** – this allows you to search for a customer
- **View Managers** – set up and view the senior personnel of your Introducer Offices who you give access to the system for management information purposes

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- **New Introducer** – this is where you add a new Introducer either as an individual or to an existing Office (see below)
- **New Office** – in many cases you will have a company that introduces to you and they may have several members of staff and possibly several branches e.g an Estate Agent branch will have several Negotiators and the Estate Agent may have several offices. This gives you the ability to set up the “Office” and then add members of staff using the “New Introducer” function described above
- **New Client** – this gives you the ability to manually add details of a lead
- **Mikogo (screen sharing)** – this is a system that allows you to share your computer screen with a customer to allow remote selling and admin
- **Best Buys** – if you have a subscription to Best Buys you can access it from here
- **Introducer Documents** – you can supply your Introducers with documents such as sales aids. Attaching them to this area will automatically make them available in your Introducers mi-Introducer system
- **Statistics** – this is where you can view your Introducers activity, productivity and so on
- **mi-Diary** – this is where you view the appointments that your Introducers have made for you

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## Setting Up Your Introducers

The following section explains how you set up your Introducers.

You can set up individual introducers or several Introducers under one “Office”

In most cases such as Estate Agents there is likely to be more than one Introducer per branch so in the first place you set up the office and then add the Individuals.

To do this click the “New Office” button and add the details as shown in the following example:

**Please enter your new introducer office below**  
 Once you have completed the details for this office please click 'Next' to continue.

Company	Hodsons Estate Agents	Region	Swindon
Address	23 Commercial Road Swindon	Phone number	
		Website	www.hodsons-ea.co.uk
Postcode	SN1 6RG	Email address	swindon@hodsons-ea.co.uk
Notes			

Cancel
 Next

Then click the “Next” button and you will see the set up view of the “Office”. This will be where you come to check each office to check the Introducers and the leads the office has produced.

Purchase Best Buys
 Activate mi-Introducers

**SN1 6RG**  
 You can add individual members of this office by clicking the 'Add introducer' button

Company	Hodsons Estate Agents	Region	Swindon
mi-Introducer enabled		Best Buys enabled	Never active
Address	23 Commercial Road Swindon	Phone number	
		Website	www.hodsons-ea.co.uk
Postcode	SN1 6RG	Email address	swindon@hodsons-ea.co.uk
Notes			

Close
 Enable office manager
 Edit office
 Add introducer

**mi-Introducers**

Introducer name	Company	Email address	Leads generated
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**mi-Introductions**

Lead name	Date generated	Current state	Lead origin
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## HBS – THE TOTAL SALES PROCESS

You MUST then click the “Activate mi-Introducers” button to make it go live and to be able to then add Introducers to this office.

Once clicked you will see the following screen, click the “Activate Introducers” button to proceed.

**Activate this office for introducers**  
 Activating this office for introducers will allow you to add one or more accounts for people within this office, with this account they will be able to send you leads either via an e-mail or directly to your Home Buyer Sourcing system and mi-Zone account.  
  
 The cost for having mi-Introducer activated is £10.00 + vat per month per office, which will need to be paid by printing a new standing order, which is available through the 'Standing Order' button on the front page of mi-Zone.  
  
 If you have more than one office you are activating at one time please add all the offices before printing a standing order to include all the offices, each office will be initially activated for 10 days allowing you time to get the new standing order to us and allow you to start getting leads immediately.  
  
 If you would like to continue and activate Hodsons Estate Agents - Swindon please click the 'Activate mi-Introducers' button below.

Cancel
 Activate Introducers

Next to add the Introducers click the “Add introducer” button and complete the details

**Please enter your new introducer details below**  
 (Once you have created an introducer account an automated e-mail will be sent to them with instructions on how they can access their account)

Office	Hodsons Estate Agents - Swindon	Company	Hodsons Estate Agents
Forename	Robert	Surname	Harris
Address	23 Commercial Road Swindon	Phone number	01793 444666
		Mobile number	
Postcode	SN1 3RG	Email address	robert@hodsons-ea.co.uk
Notes			

Cancel
 Save details & send invitation

Then click the “Save details & send invitation” button. This will send an e-mail to the Introducer inviting them to install the link to their mi-Introducer system. We supply separate instructions for them on how to install the link to their “Dashboard”.

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They will then receive the following e-mail:

Dear Robert,

I am sending this e-mail to you to set up the Introducer system that we are supplying you with to enable us to work together efficiently.

Setting this up is very simple

- Open your web browser and navigate to <http://www.HomeBuyerSystems.com>
- At the top of the screen click on the button that says 'Logon-Signup-Get a trial'
- Click on the button halfway down the screen that says 'Open mi-Introducer'
- Type in your e-mail address ('homebuyersystems1@hotmail.com') and the password 'Tennis'
- You must then create your own password and check your details, then click 'Continue' to enter the mi-Introducer Home page
- Once you're logged onto the system you can click the button 'Add to favourites' to bypass the logon stage

Now you're in and can start sending customer information to Alan, by clicking the 'Send basic contact information ...' button which will allow you to send very basic details to your advisor, or if you would like to send more information you can click 'Complete a short factfind now' which will allow you complete a very brief factfind.

If you would like to contact Alan Thompson you can by phone on 01234 453321 or 07711 121477 or by e-mail on [richard.angliss@homebuyersystems.com](mailto:richard.angliss@homebuyersystems.com)

Many Thanks

Home Buyer Systems Ltd.

You can then add further Introducers to the "Office" if there are others. When they complete the set up you will automatically receive an e-mail that lets you know they have done it.

They can now start using the system to send you leads. As previously mentioned there is a separate User Guide for your Introducers for the installation and how to use their side of the system.



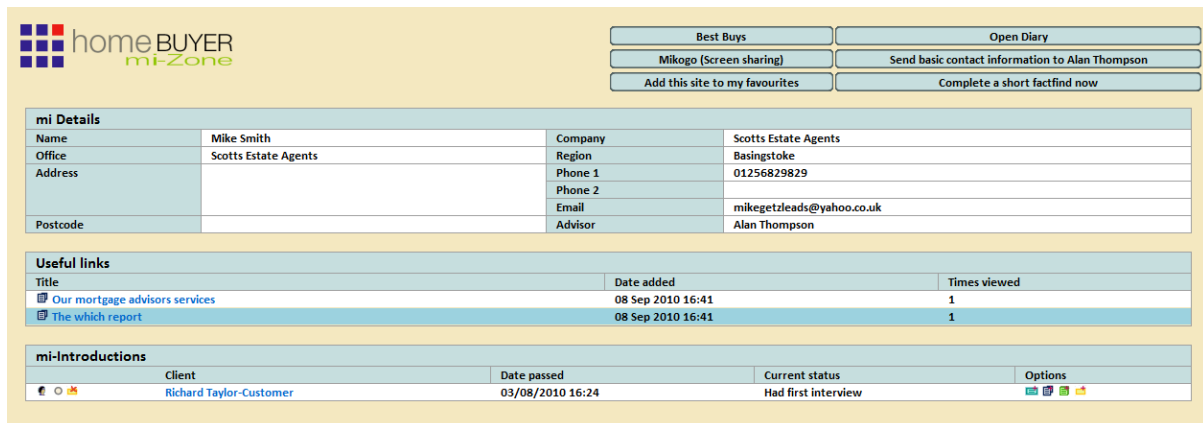
## Using mi-Introducer

This section gives you an overview of how lead generation from your Introducers and management of the relationship is handled very simply by mi-Introducer, allowing you to keep the admin to a minimum and your earnings potential to a maximum.

It is so important that everyone involved in the process is able to use the system be they an Introducer, management of an Introducing firm or you. The system is very simple so this is not an onerous task and the benefits of spending a short period of time becoming familiar with the system will pay over and over again.

To understand how to use your side of the system it helps to understand the Introducers side, so we will track the process from start to finish to give you a full appreciation of how the system works.

## Using mi-Introducer – The Introducers System



The screenshot shows the mi-Introducer system dashboard. At the top, there is a header with the homeBUYER mi-Zone logo on the left and a row of buttons on the right: 'Best Buys', 'Open Diary', 'Mikogo (Screen sharing)', 'Send basic contact information to Alan Thompson', 'Add this site to my favourites', and 'Complete a short factfind now'. Below the header, the dashboard is divided into three main sections:

- mi Details:** A table displaying contact information for Mike Smith, Scotts Estate Agents. The table has columns for Name, Office, Address, Postcode, Company, Region, Phone 1, Phone 2, Email, and Advisor.
- Useful links:** A table listing links added to the system. The table has columns for Title, Date added, and Times viewed.
- mi-Introductions:** A table listing clients referred to the system. The table has columns for Client, Date passed, Current status, and Options.

This is the Introducers “Dashboard” i.e the screen they see when they open the system.

The screen has the operating buttons at the top of the screen and then three sections that are:

**mi-Details** – This is simply where their details are displayed

**Useful links** – Your system allows you to place documents in to the Introducers system that they might find useful, such as a brochure you may have about you and your company

**mi-Introductions** – This is where they can access the clients they have referred to you. To do this they simply click the name. Also under “Options” they are given the ability to administer the customer by adding notes, sending messages to you, adding documents they receive that you need to see and add diary events.

So as you can see they have all the tools to send, track and interact with you.

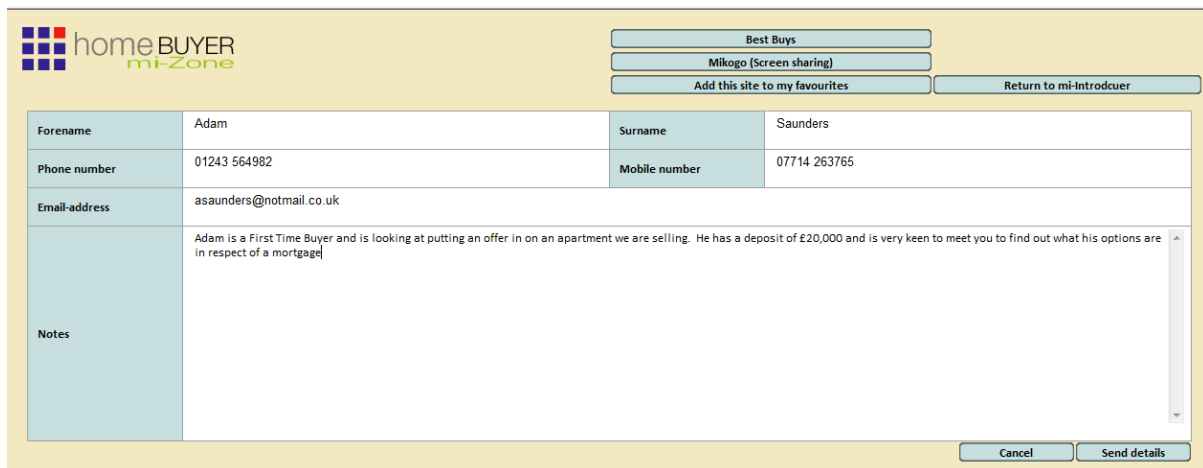
## Sending a Lead

Of course the essential function of the system is to send leads. There are two ways to do this. They can either send you:

- simple details using the free hand messaging
- more concise details using the mini factfind

## Simple Text Leads



To do this they click the “Send basic contact information to *your name*” button.





The screenshot shows a web form titled 'homeBUYER mi-Zone'. At the top right, there are three buttons: 'Best Buys', 'Mikogo (Screen sharing)', and 'Add this site to my favourites'. Below these is a 'Return to mi-Introducer' button. The form contains several input fields: 'Forename' (Adam), 'Surname' (Saunders), 'Phone number' (01243 564982), and 'Mobile number' (07714 263765). There is also an 'Email-address' field with the value 'asaunders@notmail.co.uk'. A large 'Notes' field contains the text: 'Adam is a First Time Buyer and is looking at putting an offer in on an apartment we are selling. He has a deposit of £20,000 and is very keen to meet you to find out what his options are in respect of a mortgage'. At the bottom right, there are two buttons: 'Cancel' and 'Send details'.

They simply fill in the details, type the message and then click the “Send details” button. You will then immediately receive an e-mail like the one shown here giving you the details:

A new lead has been generated from - Mike Smith

[Back to messages](#) |  

 miZone@HomeBuyerSystems.com [Add to contacts](#)  
To richard.angliss@homebuyersystems.com

10:15  
[Reply](#) 

### You have a new lead!

Dear Alan,

You have been sent a lead by : Mike Smith from Scotts Estate Agents

Client Name : Adam Saunders  
Telephone 1 : 01243 564982  
Telephone 2 : 07714 263765  
Email : richard.angliss@virgin.net

Additional :

Adam is a First Time Buyer and is looking at putting an offer in on an apartment we are selling. He has a deposit of £20,000 and is very keen to meet you to find out what his options are in respect of a mortgage

Introducer contact information

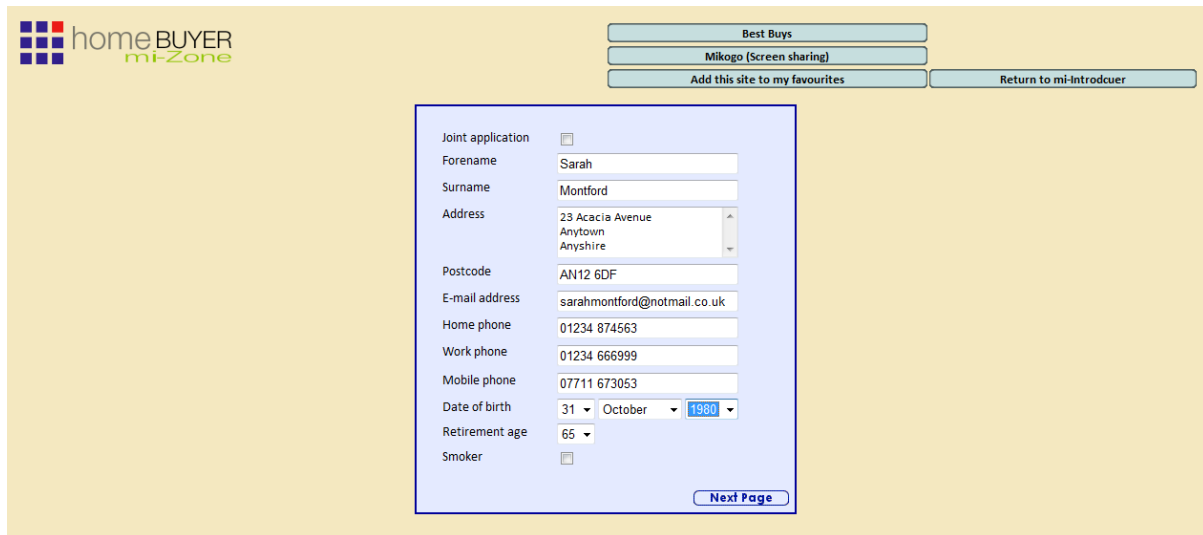
Address :  
Telephone 1 : 01256829829  
Telephone 2 :  
Email : mikegetzleads@yahoo.co.uk

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## Mini Factfind Leads

The other way for your Introducer to provide leads is by provide basic details of their circumstances.

To do this they click the “Complete a short Factfind now” button. The following screen will appear:

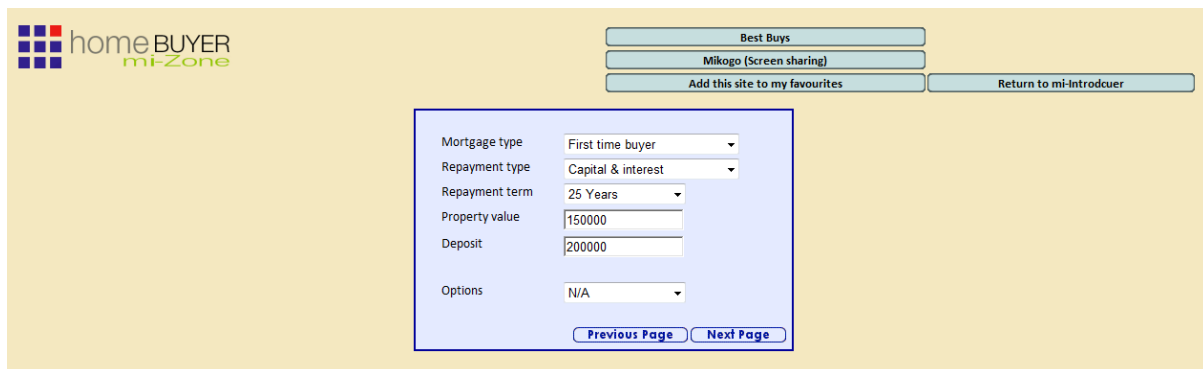


The screenshot shows a web form titled "homeBUYER mi-Zone". At the top right, there are four buttons: "Best Buys", "Mikogo (Screen sharing)", "Add this site to my favourites", and "Return to mi-Introducer". The main form area contains a "Joint application" checkbox and several input fields for personal details:

- Forename: Sarah
- Surname: Montford
- Address: 23 Acacia Avenue, Anytown, Anyshire
- Postcode: AN12 6DF
- E-mail address: sarahmontford@notmail.co.uk
- Home phone: 01234 874563
- Work phone: 01234 666999
- Mobile phone: 07711 673053
- Date of birth: 31 October 1980
- Retirement age: 65
- Smoker: ☐

A "Next Page" button is located at the bottom right of the form.

The first screen takes basic details the second screen takes financial details:



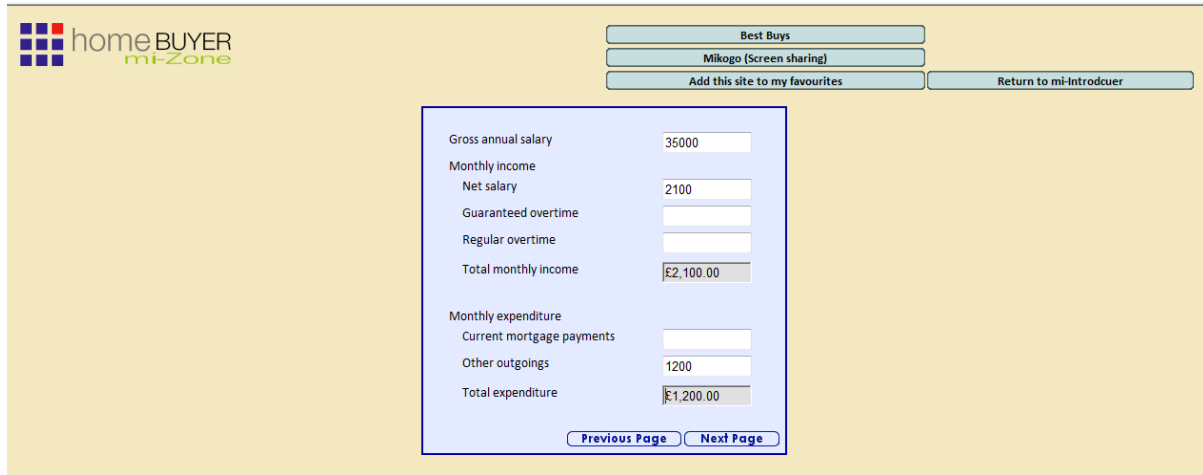
The screenshot shows the second screen of the Mini Factfind Leads form, titled "homeBUYER mi-Zone". At the top right, there are four buttons: "Best Buys", "Mikogo (Screen sharing)", "Add this site to my favourites", and "Return to mi-Introducer". The main form area contains several dropdown menus and input fields for financial details:

- Mortgage type: First time buyer
- Repayment type: Capital & interest
- Repayment term: 25 Years
- Property value: 150000
- Deposit: 200000
- Options: N/A

At the bottom of the form, there are two buttons: "Previous Page" and "Next Page".

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The third screen takes income and expenditure details:



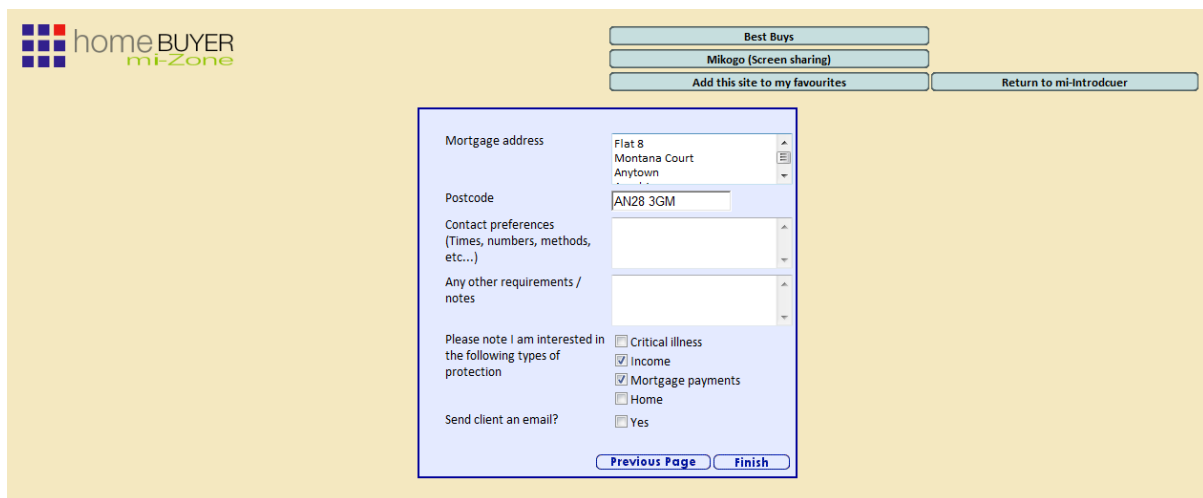
The third screen displays a form for entering income and expenditure details. The form is titled "homeBUYER mi-Zone" and includes a navigation bar with links: "Best Buys", "Mikogo (Screen sharing)", "Add this site to my favourites", and "Return to mi-introducer".

The form fields are as follows:

Category	Field	Value
Monthly income	Gross annual salary	35000
	Net salary	2100
	Guaranteed overtime	
	Regular overtime	
	Total monthly income	£2,100.00
Monthly expenditure	Current mortgage payments	
	Other outgoings	1200
	Total expenditure	£1,200.00

Navigation buttons: "Previous Page" and "Next Page".

The fourth and final screen takes the following details:



The fourth and final screen displays a form for entering mortgage and contact details. The form is titled "homeBUYER mi-Zone" and includes a navigation bar with links: "Best Buys", "Mikogo (Screen sharing)", "Add this site to my favourites", and "Return to mi-introducer".

The form fields are as follows:



Category	Field	Value
Mortgage address	Flat 8	
	Montana Court	
Postcode	Anytown	
	AN28 3GM	
Contact preferences (Times, numbers, methods, etc...)		
Any other requirements / notes		
Please note I am interested in the following types of protection	<input type="checkbox"/> Critical illness	
	<input checked="" type="checkbox"/> Income	
	<input checked="" type="checkbox"/> Mortgage payments	
	<input type="checkbox"/> Home	
Send client an email?	<input type="checkbox"/> Yes	

Navigation buttons: "Previous Page" and "Finish".

**NB – Please Note that your Introducer can complete as much as or as little of this information as you and they agree you would need. There is no compulsion to have to provide everything**

# HBS – THE TOTAL SALES PROCESS

Once they have completed the information they click “Finish” and then you will immediately receive an e-mail like this:

A new downloadable lead has been generated from - Mike Smith at Scotts Estate Agents [Back to messages](#) |  

miZone@HomeBuyerSystems.com

Add to contacts

To richard.angliss@homebuyersystems.com

10:47

Reply

**You have a new lead!**

Dear Alan,

A new lead has been generated by Mike Smith from Scotts Estate Agents

Client Name : Sarah Montford  
 Telephone 1 : 01234 874563  
 Telephone 2 : 07711 673053  
 Email : sarahmontford@hotmail.co.uk

Introducer contact information  
 Address :  
 Telephone 1 : 01256829829  
 Telephone 2 :  
 Email : mikegetzleads@yahoo.co.uk

Many Thanks

Home Buyer Systems Ltd.

## Administering the Leads

Now turning to your mi-Introducer Dashboard you will now see the new lead (or leads in this case – Adam Saunders and Sarah Montford)

homeBUYER

miZone

Find Client

View Managers

New Introducer

New Office

New Client

Mikogo (Screen sharing)

Best Buys

Introducer documents

Statistics

mi-Diary

**Updates**

No diary events

No outstanding ToDo items

1 - Unread Message

1 - Unseen Note

No unviewed Documents

1 - New MustMail message

**mi-Leads**

View deleted

Name	Current state	Date added	Generated by	Activated on mi-Zone	Downloaded to HBS	mustmail account
Sarah Montford	Unknown	31/10/2010 10:33	mi-Introducer	Inactive	No	Not activated
Adam Saunders	Unknown	31/10/2010 10:15	mi-Introducer	Inactive	No	Not activated
ewrwe werwer	Unknown	14/09/2010 14:33	BestBuys	Inactive	No	Not activated
Richard Taylor	Unknown	03/09/2010 12:49	BestBuys	Inactive	No	Not activated
dsf sdfsd	Unknown	02/09/2010 15:10	BestBuys	Inactive	No	Not activated
jkhkj kjkh	Unknown	02/09/2010 14:43	BestBuys	Inactive	No	Not activated
jhg kjh	Unknown	02/09/2010 14:39	BestBuys	Inactive	No	Not activated
kjhkh kjkh	Unknown	02/09/2010 14:37	BestBuys	Inactive	No	Not activated
sadsad asdasd	Unknown	02/09/2010 14:30	BestBuys	Inactive	No	Not activated
dsfd sdfsd	Unknown	02/09/2010 14:23	BestBuys	Inactive	No	Not activated

**mi-Introducing Offices**

Name	Region	Best Buys active	mi-Introducer active	Introducers #	Leads passed #
HBS Estate Agents	Southampton	Inactive	Active	1	12
Hodsons Estate Agents	Swindon	Inactive	Active	1	0
Scotts Estate Agents	Basingstoke	Inactive	Active	1	3
test	hampshire	Inactive	Active	0	0

**mi-Introducers**

Show inactive

Name	Office	E-mail	Telephone	Leads passed
Robert Harris	Hodsons Estate Agents - Swindon	homebuyersystems1@hotmail.com	01793 444666	0
Robin Peters	No Office	RichardAngliss@hotmail.com	01234 788654 / 07714 657876	0
Mike Smith	Scotts Estate Agents - Basingstoke	mikegetzleads@yahoo.co.uk	01256829829	3
Richard Taylor	No Office	HBSestates@googlemail.com	01234 765234	5
Richard Taylor	HBS Estate Agents - Southampton	richardtaylorpersonal@yahoo.co.uk	01226 388788	6

If you use HBS for mortgage sourcing you will also find that the details are available ready to source in your system.

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You would then begin work on the lead. To do this click on the name of the customer in the mi-Leads section and you will see the following screen:

<b>Sarah Montford</b> (Introduced by : Mike Smith from Scotts Estate Agents)				<a href="#">Change state</a>	
Date added : 31 October 2010 10:33    Current state : <b>Not set</b>					
<b>Personal</b>		<b>Mortgage</b>		<b>Financial</b>	
Address		23 Acacia Avenue Anytown Anyshire		Home telephone 01234 874563	
				Work telephone 01234 666999	
				Mobile telephone 07711 673053	
Postcode		AN12 6DF		E-mail sarahmontford@notmail.co.uk	
Date of birth		19801031		Retirement age 65	
<a href="#">Create mustmail account</a> <a href="#">Invite your customer to use mi-Zone</a> <a href="#">Edit client</a> <a href="#">Add a ToDo item</a> <a href="#">Send a message</a> <a href="#">New note</a> <a href="#">New document</a>					
<b>Alerts / To Do</b>		<b>Messages</b>		<b>Notes</b>	
Item Added		Completed		Type / Title	
				Added by	
				To complete by	
				by who	

Really this is about the stages the Lead goes through to its conclusion and that is done by using the Change State button.

In the first instances the “Current State” is set to “Not set” the aim is for you to change this as it progresses to a sale or not, as the case may be. Each time you update it the person that introduced the case to you is immediately updated through the system by e-mail and by making the change to the customer record on their mi-Introducer system.

So for instance the most likely first step would be to make contact and then record the outcome:


<b>Client</b>	Sarah Montford		
<b>Current state</b>	None set	<b>New state</b>	Appointment Agreed
<b>Notes</b>	Called Sarah and we have agreed to meet at 3pm on Wednesday (3rd) at my office.		
(If you send an e-mail update to your client or introducer these notes will appear in that e-mail)			
<input checked="" type="checkbox"/> Send an e-mail update to your introducer		<input type="checkbox"/> Send an e-mail update to your client	
		<a href="#">Cancel</a> <a href="#">Apply changes</a>	

Once you have added what the “New state” is and typed a message into the “Notes” section you can click the “Send an e-mail to your Introducer” and if appropriate “Send an e-mail to your client”.

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Then click “Apply changes”. This will take you to the screen you were on previously but now it will be displaying the details you have just added.

**Sarah Montford** (Introduced by : Mike Smith from Scotts Estate Agents) Change state

Date added : 31 October 2010 10:33 Current state : **Appointment Agreed** 



Personal		Mortgage		Financial		Other	
Address	23 Acacia Avenue	Home telephone		01234 874563			
	Anytown	Work telephone		01234 666999			
	Anyshire	Mobile telephone		07711 673053			
Postcode	AN12 6DF	E-mail	sarahmontford@hotmail.co.uk				
Date of birth	19801031	Retirement age	65				

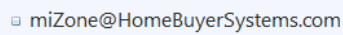

[Create mustmail account](#)
[Invite your customer to use mi-Zone](#)
[Edit client](#)
[Add a ToDo item](#)
[Send a message](#)
[New note](#)
[New document](#)

Alerts / To Do		Messages		Notes		Documents		Security	
Item Added	Completed	Type / Title		Added by		To complete by		by who	

You will notice that the “Current state” has now changed to “Appointment Agreed”. If you click the “?” symbol the note you entered will be shown.

Your Introducer will receive the following e-mail:


An update has been made by Alan Thompson to your mi-Zone account Back to messages  

 [Add to contacts](#) 12:48   
To mikegetzleads@yahoo.co.uk Reply

Dear Mike,  
This message is being sent to make you aware I have updated the mi-Zone account status for Sarah Montford to 'Appointment Agreed'  
The reasons for this are as follows :  
Called Sarah and we have agreed to meet at 3pm on Wednesday (3rd) at my office.



Many Thanks  
Alan Thompson













On their Dashboard screen the new status of “Appointment Agreed” will then be shown:



[Best Buys](#)
[Open Diary](#)
[Mikogo \(Screen sharing\)](#)
[Send basic contact information to Alan Thompson](#)
[Add this site to my favourites](#)
[Complete a short factfind now](#)

mi Details			
Name	Mike Smith	Company	Scotts Estate Agents
Office	Scotts Estate Agents	Region	Basingstoke
Address		Phone 1	01256829829
		Phone 2	
Postcode		Email	mikegetzleads@yahoo.co.uk
		Advisor	Alan Thompson

Useful links		
Title	Date added	Times viewed
 Our mortgage advisors services	08 Sep 2010 16:41	1
 The which report	08 Sep 2010 16:41	1

mi-Introductions			
Client	Date passed	Current status	Options
 Sarah Montford	31/10/2010 10:33	<b>Appointment Agreed</b>	  
 Adam Saunders	31/10/2010 10:15	Unknown	  
 Richard Taylor-Customer	03/08/2010 16:24	Had first interview	  

## HBS – THE TOTAL SALES PROCESS

After the appointment you would update the “Current state” to whatever the outcome of the meeting was and when you change it. The e-mail and update of the dashboard process will happen again as explained above.

When entering the “Current state” you may wish to use the “Add To Do item” facility to remind you. Simply complete the details and then click the “Yes” button to enter the time and date you want to be reminded.

Title	Remember to let Mike know the outcome of meeting		
Type (Optional)			
Complete by	You - Alan Thompson		
Details	Let Mike know how meeting with Sarah goes		
Is there a specific date / time for this task?		<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>	
Alert all involved parties by e-mail		<input type="checkbox"/> Send e-mail	
Date	04/11/2010	Time	11:00
		<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

As well as the “Add To Do Item” button there are several others, which are:

**Create must mail account** – this is for use with our mi-Zone system and creates a unique e-mail address for your customer for use on application forms so that lenders correspond directly with it

**Invite your customer to use mi-Zone** – this sets up a mi-Zone account for your customer so that you can use this to work with them to help them make applications for a mortgage and insurance products

**Edit client** – If you need to add details top a customer’s record or change anything clicking this button will give you access

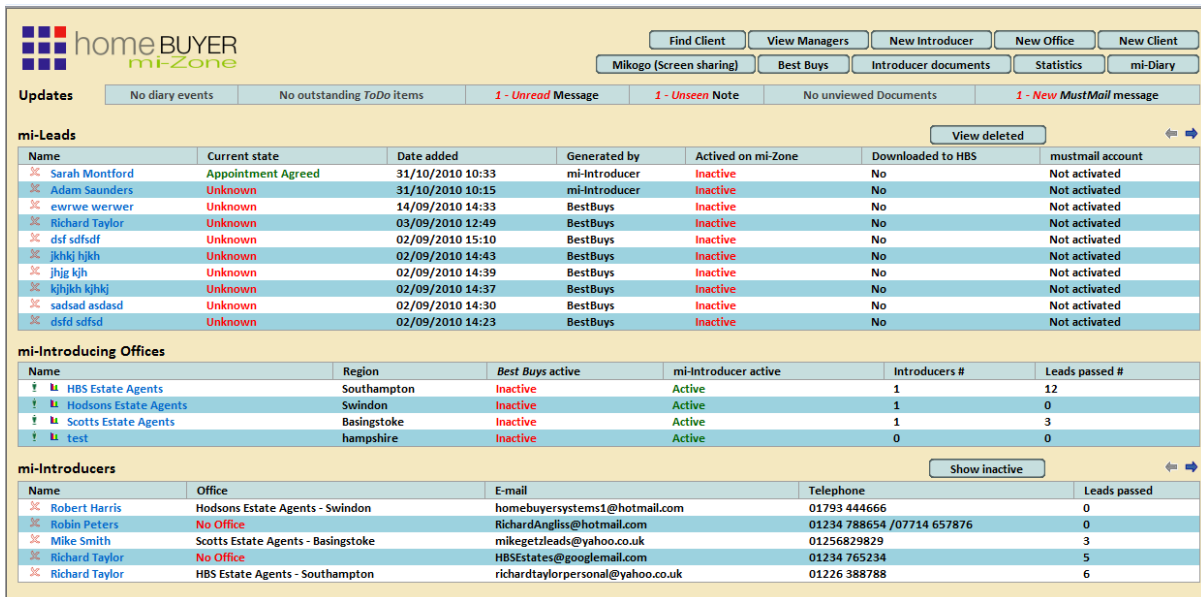
**Send a message** – this allows you to send a message to your customer or Introducer

**New note** – you can add notes here

**New document** – if you wish to add a document for the customer to view then click this button to add it



## Other Advisor Dashboard Features



The screenshot shows the HBS mi-Zone dashboard with the following sections:

- Navigation Buttons:** Find Client, View Managers, New Introducer, New Office, New Client, Mikogo (Screen sharing), Best Buys, Introducer documents, Statistics, mi-Diary.
- Updates:** No diary events, No outstanding ToDo items, 1 - Unread Message, 1 - Unseen Note, No unviewed Documents, 1 - New MustMail message.
- mi-Leads:** A table with columns: Name, Current state, Date added, Generated by, Activated on mi-Zone, Downloaded to HBS, mustmail account. It lists several leads with their current states (Appointment Agreed, Unknown, Inactive).
- mi-Introducing Offices:** A table with columns: Name, Region, Best Buys active, mi-Introducer active, Introducers #, Leads passed #. It lists offices like HBS Estate Agents, Hodsons Estate Agents, and Scotts Estate Agents.
- mi-Introducers:** A table with columns: Name, Office, E-mail, Telephone, Leads passed. It lists individuals like Robert Harris, Robin Peters, Mike Smith, Richard Taylor, and Richard Taylor.

At the top of your Dashboard screen are several buttons some of which we have already used such as “New Introducer” and “New Office”.

Here is a guide to the rest:

**Find Client** – this allows you to search for clients to find them quickly

**View Managers** – the system allows for managerial staff of the Introducing companies to have access. Here you can add Managers, edit them and so on

**New Client** – to add clients that have not been sent to you click on this button and enter their details here

**Mikogo (screen sharing)** – Mikogo is a free system that allows you to share your computer screen with a customer. This button gives access to it

**Best Buys** – If you subscribe to Best Buys this gives you access to the area where you can administer it

**Introducer Documents** – this is where you can add documents you would like your Introducers to have such as sales aids. When you add the document here the Introducer will find that they then have access to it from the “Useful links” section of their Dashboard

**Statistics** – This is where you can check the statistics for your Introducers

**mi-Diary** – You access your diary from here

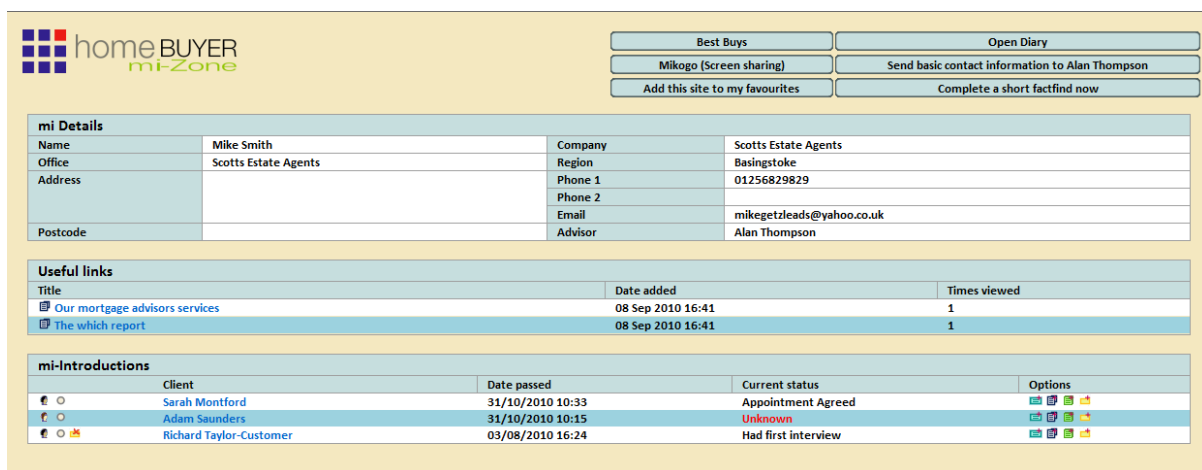
# HBS – THE TOTAL SALES PROCESS

## mi-Diary

This feature allows your Introducer to book appointments directly into a Diary. The reason this feature was requested was because by doing so it commits the customer rather than wait for you to contact them to book an appointment.

Customers said that they would rather have this and move appointments round than not have a customer committed to an appointment. Of course you do not have to use it if you would prefer not to.

So to demonstrate how it works we start at the Introducers Dashboard as shown below.



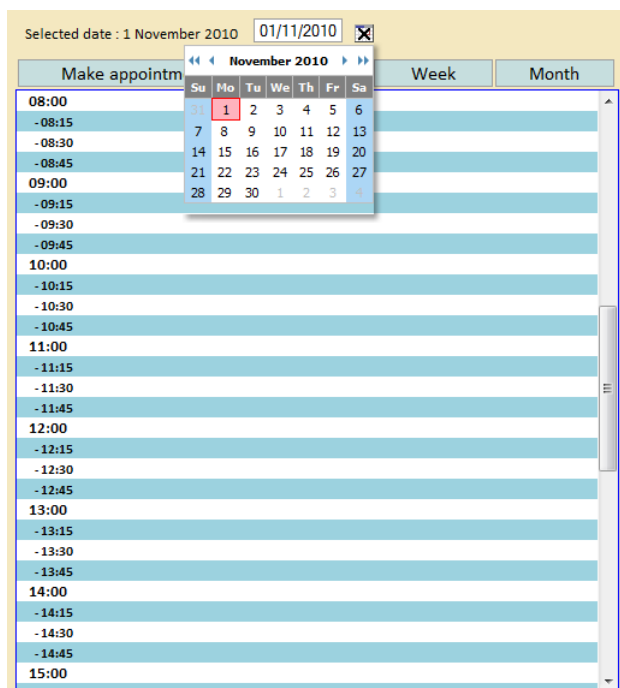
The screenshot shows the 'mi-Diary' interface. At the top, there's a navigation bar with buttons: 'Best Buys', 'Open Diary', 'Mikogo (Screen sharing)', 'Send basic contact information to Alan Thompson', 'Add this site to my favourites', and 'Complete a short factfind now'. Below this is a section for 'mi Details' containing a table with fields like Name, Office, Address, Postcode, Company, Region, Phone 1, Phone 2, Email, and Advisor. The details for Mike Smith at Scotts Estate Agents are shown. Below the details is a 'Useful links' section with a table listing links, their dates added, and times viewed. The bottom section is 'mi-Introductions', which is a table listing clients, dates passed, current status, and options.

mi Details	
Name	Mike Smith
Office	Scotts Estate Agents
Address	
Postcode	
Company	Scotts Estate Agents
Region	Basingstoke
Phone 1	01256829829
Phone 2	
Email	mikegetzleads@yahoo.co.uk
Advisor	Alan Thompson

Useful links		
Title	Date added	Times viewed
Our mortgage advisors services	08 Sep 2010 16:41	1
The which report	08 Sep 2010 16:41	1

mi-Introductions			
Client	Date passed	Current status	Options
Sarah Montford	31/10/2010 10:33	Appointment Agreed	
Adam Saunders	31/10/2010 10:15	Unknown	
Richard Taylor-Customer	03/08/2010 16:24	Had first interview	

To access your Diary they click the “Open Diary” button.



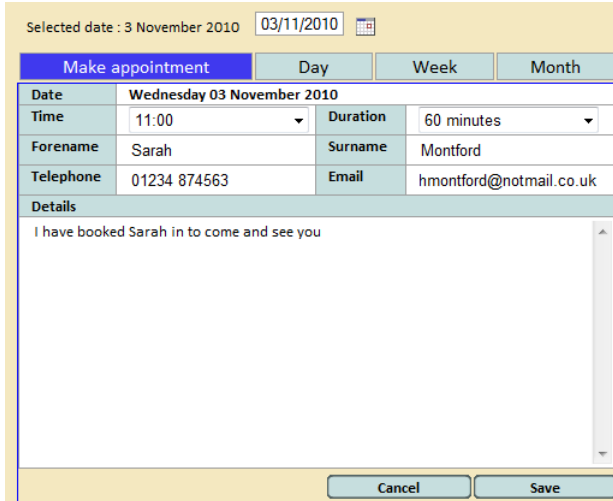
The screenshot shows a calendar interface for booking appointments. At the top, there's a date selector showing 'Selected date: 1 November 2010' and a calendar for 'November 2010'. Below the calendar is a table with columns for 'Make appointment', 'Week', and 'Month'. The 'Make appointment' column lists times from 08:00 to 15:00 in 15-minute increments. The 'Week' column shows the days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and the dates. The 'Month' column is currently empty.

Make appointment	Week	Month
08:00	Su 1	
-08:15	Mo 2	
-08:30	Tu 3	
-08:45	We 4	
09:00	Th 5	
-09:15	Fr 6	
-09:30	Sa 7	
-09:45	Su 8	
10:00	Mo 9	
-10:15	Tu 10	
-10:30	We 11	
-10:45	Th 12	
11:00	Fr 13	
-11:15	Sa 14	
-11:30	Su 15	
-11:45	Mo 16	
12:00	Tu 17	
-12:15	We 18	
-12:30	Th 19	
-12:45	Fr 20	
13:00	Sa 21	
-13:15	Su 22	
-13:30	Mo 23	
-13:45	Tu 24	
14:00	We 25	
-14:15	Th 26	
-14:30	Fr 27	
-14:45	Sa 28	
15:00	Su 29	

## HBS – THE TOTAL SALES PROCESS

To then add an appointment they click the calendar icon which appears next to the current date at the top of the screen and then select the day they wish to book the appointment for.

This will then bring up the following screen where they will enter the details.



Selected date : 3 November 2010 03/11/2010

Make appointment Day Week Month

Date Wednesday 03 November 2010

Time 11:00 Duration 60 minutes

Forename Sarah Surname Montford

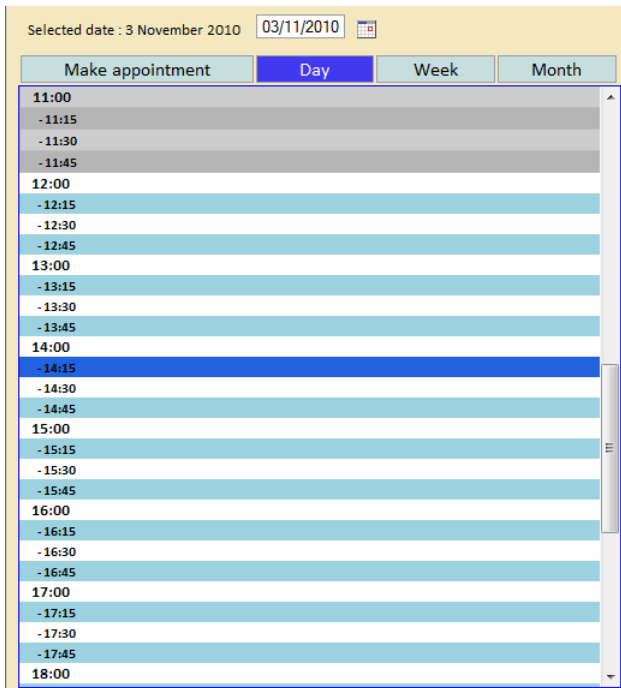
Telephone 01234 874563 Email hmontford@notmail.co.uk

Details

I have booked Sarah in to come and see you

Cancel Save

Once the details have been entered they click “Save” the appointment will appear and have blocked out the time slot. This will prevent any other appointments being made for this time slot.



Selected date : 3 November 2010 03/11/2010

Make appointment Day Week Month

11:00

- 11:15

- 11:30

- 11:45

12:00

- 12:15

- 12:30

- 12:45

13:00

- 13:15

- 13:30

- 13:45

14:00

- 14:15

- 14:30

- 14:45

15:00

- 15:15

- 15:30

- 15:45

16:00

- 16:15

- 16:30

- 16:45

17:00

- 17:15


- 17:30


- 17:45

18:00

# HBS – THE TOTAL SALES PROCESS

The customer will receive confirmation of the appointment by e-mail:

Appointment request : Alan Thompson from HBS Back to messages |  

 miZone@HomeBuyerSystems.com [Add to contacts](#) 07:16  
Reply 


To sarahmontford@hotmail.co.uk

Sarah,  
You have requested an appointment with Alan Thompson from HBS arranged by  
Appointment starting : 03 Nov 2010 11:00  
ending : 03 Nov 2010 12:00

Advisor contact details :  
Name : Alan Thompson  
Phone number : 01234 453321 / 07711 121477  
E-mail : richard.angliss@homebuyersystems.com  
Address : 12 The Street Anytown AN12 6Th AN12 6Th



This is an automated e-mail by Home Buyer Systems Ltd, please do not reply











If you then go to your Dashboard you will see that you have a new message in the Notes of your Updates section. When you click on it the system will open the unread messages as shown below.

 Find Client View Managers New Introducer New Office New Client  
Mikogo (Screen sharing) Best Buys Introducer documents Statistics mi-Diary

**Updates** No diary events No outstanding ToDo items 1 - Unread Message 2 - Unseen Notes No unviewed Documents 1 - New MustMail message

Note added	Client	Title	Added by	Read
01 Nov 2010 07:16	Sarah Montford	Initial note	Sarah Montford (Client)	<input type="checkbox"/>
31 Oct 2010 10:15	Adam Saunders	Initial note	Adam Saunders (Client)	<input type="checkbox"/>

**mi-Leads** View deleted  

Name	Current state	Date added	Generated by	Activated on mi-Zone	Downloaded to HBS	mustmail account
 Sarah Montford	Unknown	01/11/2010 07:16	mi-Introducer	Inactive	No	Not activated
 Sarah Montford	Appointment Agreed	31/10/2010 10:33	mi-Introducer	Inactive	No	Not activated
 Adam Saunders	Unknown	31/10/2010 10:15	mi-Introducer	Inactive	No	Not activated
 ewrwe wewer	Unknown	14/09/2010 14:33	BestBuys	Inactive	No	Not activated
 Richard Taylor	Unknown	03/09/2010 12:49	BestBuys	Inactive	No	Not activated
 dsf sdfsf	Unknown	02/09/2010 15:10	BestBuys	Inactive	No	Not activated
 jkhkj hkh	Unknown	02/09/2010 14:43	BestBuys	Inactive	No	Not activated
 jhij kjh	Unknown	02/09/2010 14:39	BestBuys	Inactive	No	Not activated
 kjhkh kjhkh	Unknown	02/09/2010 14:37	BestBuys	Inactive	No	Not activated
 sadsad asdsad	Unknown	02/09/2010 14:30	BestBuys	Inactive	No	Not activated


When you click on the clients name it brings up the details of the appointment.

**Sarah Montford** Change state

Date added : 01 November 2010 07:16 Current state : **Not set**

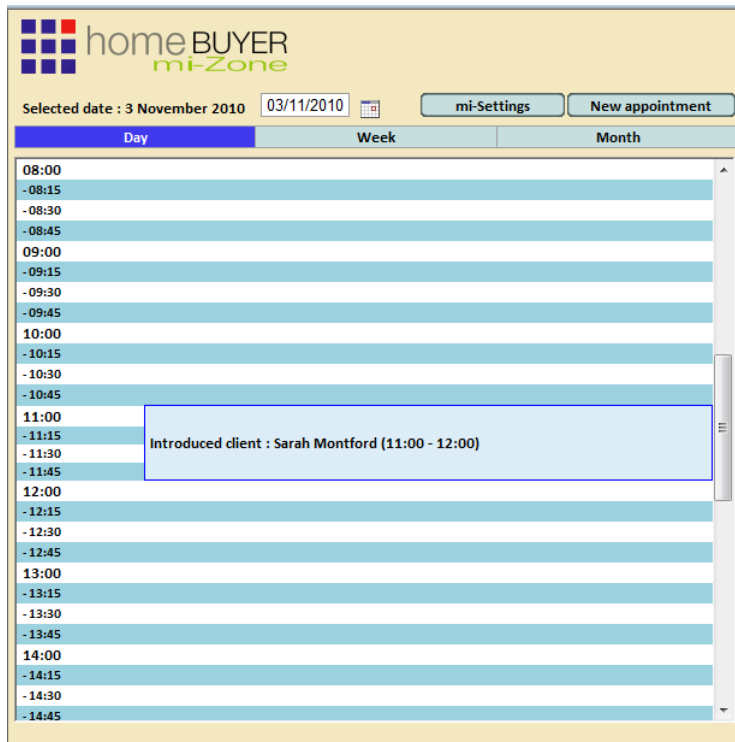
Personal	Mortgage	Financial	Other
Address	Home telephone	01234 874563	
	Work telephone		
	Mobile telephone		
Postcode	E-mail	sarahmontford@hotmail.co.uk	
Date of birth	Retirement age		

[Create mustmail account](#) [Invite your customer to use mi-Zone](#) [Edit client](#) [Add a ToDo item](#) [Send a message](#) [New note](#) [New document](#)

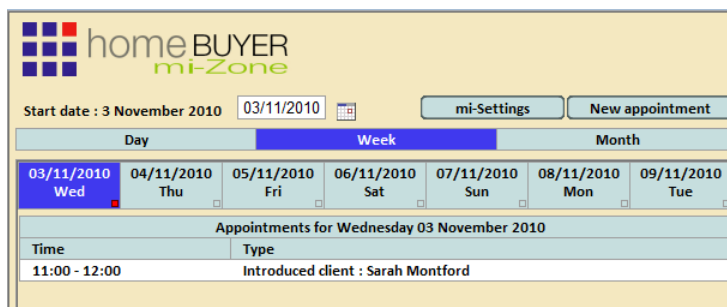
Alerts / To Do	Messages	New Notes	Documents	Security
Note Added	Subject	Added by	Date read	Note
 01 Nov 2010 07:16	Initial note	The introducer	Never	I have booked Sarah in to come and see you

# HBS – THE TOTAL SALES PROCESS

When you click on the Day view for the day of the appointment you will see the following:



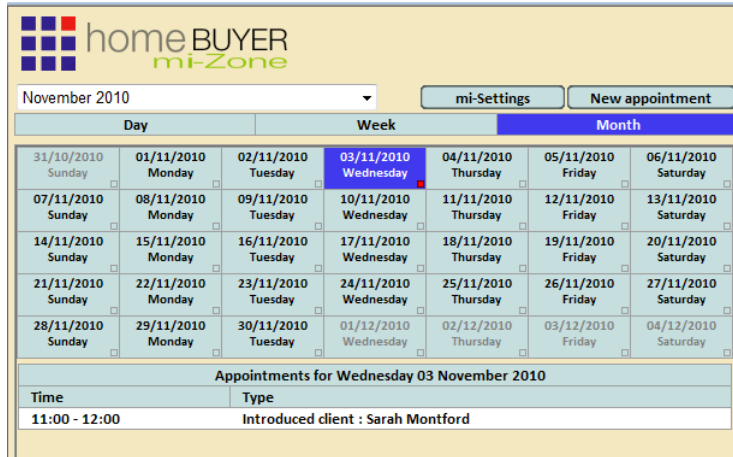
When you click on Week you will see the following view. Please note that any days that have appointments booked have a red square in the bottom right hand corner. When you click on the day the details of the appointment/s are displayed:



Appointments for Wednesday 03 November 2010	
Time	Type
11:00 - 12:00	Introduced client : Sarah Montford

# HBS – THE TOTAL SALES PROCESS

Clicking on Month you get the following view:



November 2010						
Day		Week		Month		
31/10/2010 Sunday	01/11/2010 Monday	02/11/2010 Tuesday	03/11/2010 Wednesday	04/11/2010 Thursday	05/11/2010 Friday	06/11/2010 Saturday
07/11/2010 Sunday	08/11/2010 Monday	09/11/2010 Tuesday	10/11/2010 Wednesday	11/11/2010 Thursday	12/11/2010 Friday	13/11/2010 Saturday
14/11/2010 Sunday	15/11/2010 Monday	16/11/2010 Tuesday	17/11/2010 Wednesday	18/11/2010 Thursday	19/11/2010 Friday	20/11/2010 Saturday
21/11/2010 Sunday	22/11/2010 Monday	23/11/2010 Tuesday	24/11/2010 Wednesday	25/11/2010 Thursday	26/11/2010 Friday	27/11/2010 Saturday
28/11/2010 Sunday	29/11/2010 Monday	30/11/2010 Tuesday	01/12/2010 Wednesday	02/12/2010 Thursday	03/12/2010 Friday	04/12/2010 Saturday

Appointments for Wednesday 03 November 2010	
Time	Type
11:00 - 12:00	Introduced client : Sarah Montford

Again for any day that appointments have been booked for you will see a red square. When you click on the day the details will appear underneath.

## Statistics

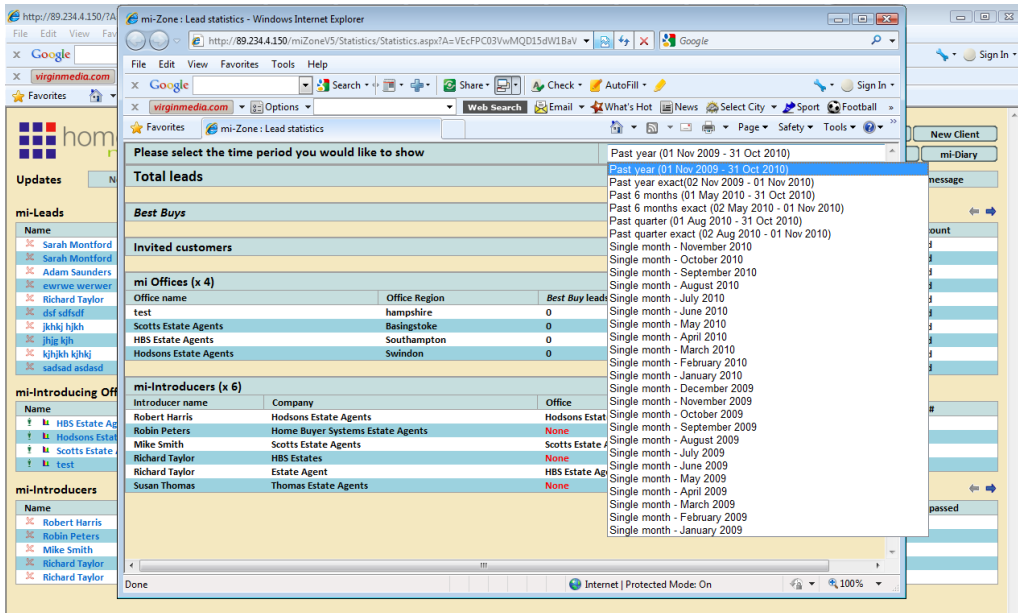
The statistics facility gives you the ability to manage your Introducer relationships and more importantly get the most out of them.

The statistics area gives you information on individuals, offices and whole companies. It gives you the opportunity to analyse performance and outcomes that ensure you and your Introducers gain the absolute maximum from working together.

You can use it to access where things may not be as good as they might be and provide the ability for you to work with the management and/or individuals to optimise lead and income generation.

# HBS – THE TOTAL SALES PROCESS

You access this area from your Dashboard by clicking the “Statistics” button:



The screenshot shows the 'mi-Zone: Lead statistics' page. It includes a sidebar with navigation links like 'mi-Leads', 'mi-Introducing Off', and 'mi-Introducers'. The main content area displays several tables and lists:

- Total leads**: A dropdown menu to select the time period (e.g., 'Past year (01 Nov 2009 - 31 Oct 2010)').
- Best Buys**: A list of leads with columns for Name, Office Region, and Best Buy leads.
- Invited customers**: A list of customers with columns for Name, Office Region, and Best Buy leads.
- mi Offices (x 4)**: A table with columns for Office name, Office Region, and Best Buy leads.
- mi-Introducers (x 6)**: A table with columns for Introducer name, Company, and Office.

Then to select the time period you would like to look at click the box in the top right hand corner that will be pre-set to the last calendar year and you will see that you can select different time periods.

Click on the one you wish to view and the details will be displayed.

## Conclusion

We hope that you find this simple but effective system both enhances your existing introducer relationships but also gives you the ability to win new ones.

If you have any questions or need any help please do not hesitate to let us know by calling us on 01730 829829 or e-mailing us at [enquiries@homebuyersystems.com](mailto:enquiries@homebuyersystems.com)